UNIVERSITY OF ALBERTA
FACULTY OF SCIENCE
Department of Computing Science

SOFTWARE
PRODUCT
MANAGEMENT

KANBAN TUTORIAL WITH TRELLO

Kanban Tutorial with Trello

In this tutorial, we'll walk you through the steps of creating a Kanban board using Trello, and understand how to visualize the workflow on a Trello board.

The topics in this tutorial are:

Prerequisite

- Finish watching Video 2.4.2: Kanban
- Read pg. 41-42 from Course Notes

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What is Kanban?

Kanban is a project management system invented by Taiichi Ohno, an industrial engineer at Toyota. Kanban involves a technique to organize and track project progress visually, which is widely used even outside Agile or Lean software development. Kanban technique uses a board, with a set of columns labeled by the stages of completion. In its simplest form, it follows the "To Do", "Doing", "Done" workflow. An effectively managed Kanban board will give you a clear picture of your project status at a glance. It can also help with improving efficiency, productivity and collaboration.

What is Trello?

Trello is a powerful project management software that enables users to coordinate tasks and visually manage projects. As a productivity tool, it allows individuals and teams to organize and track work through a system of customizable boards, lists, and cards. According to the enlyft report, Trello is taking about 18% of the market share, and there are around 12,000 companies that use Trello.
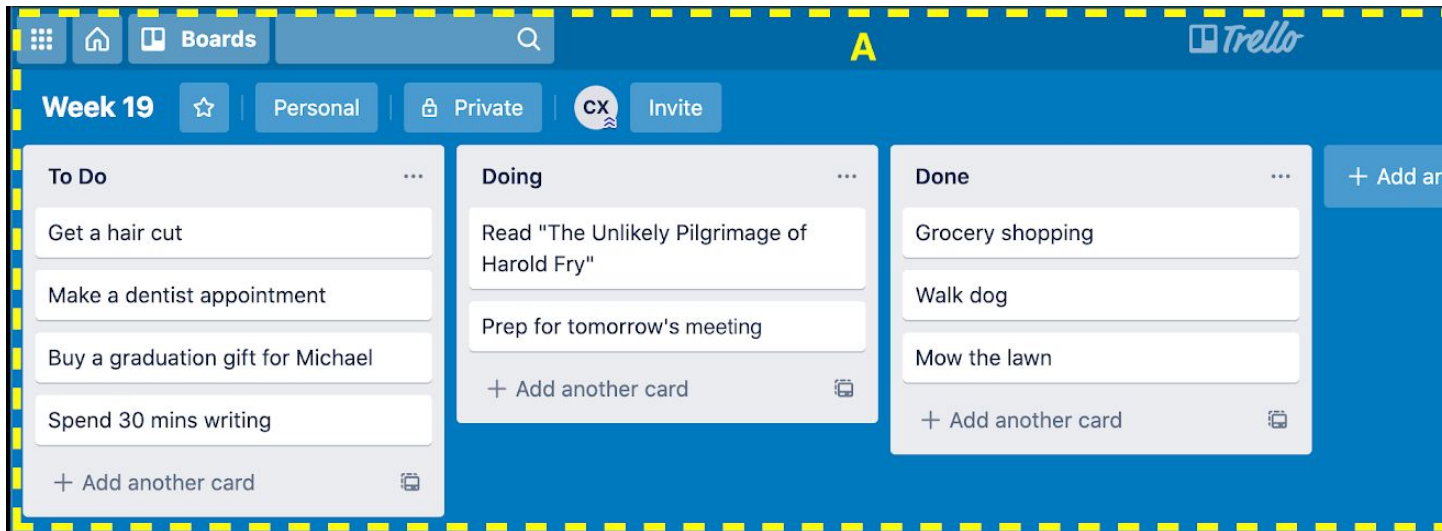
Understand Trello Basics

A Trello board has four key components, namely **Boards**, **Lists**, **Cards** and **Menu**.

A. Board

A **board** is a place to keep track of work and see its path towards completion.

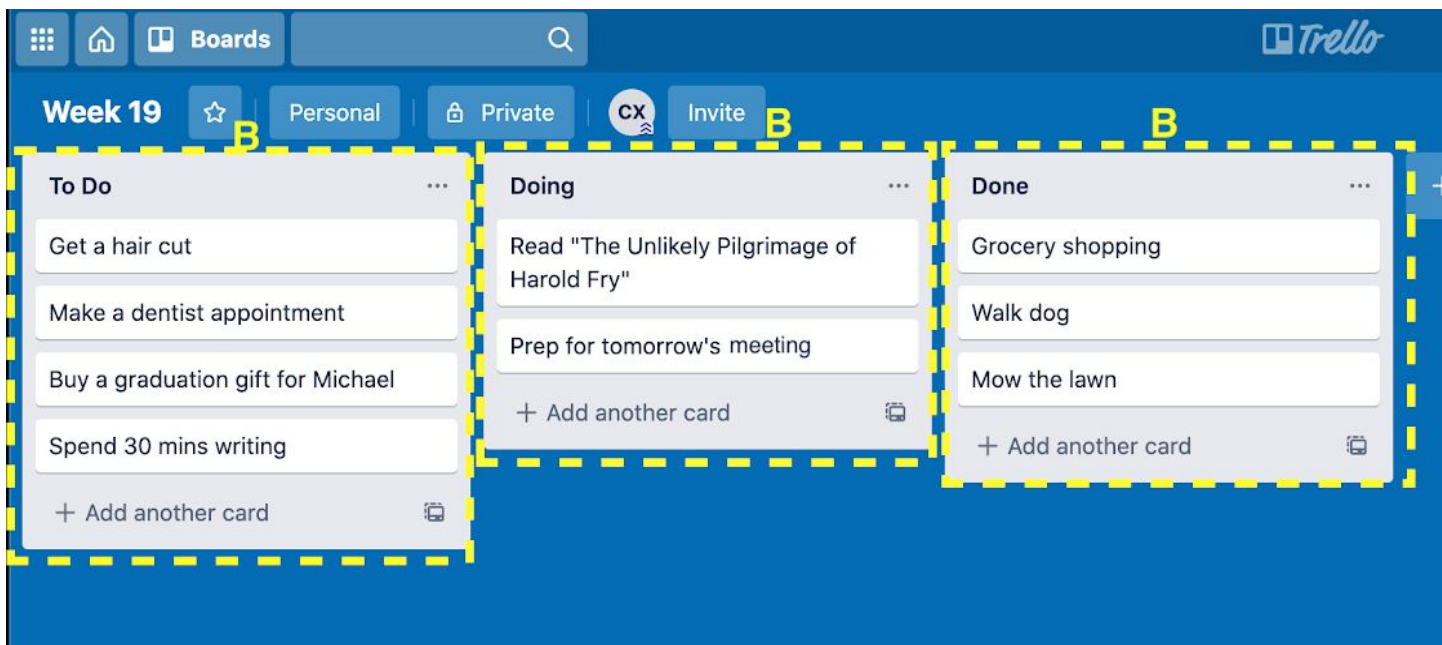**UNIVERSITY OF ALBERTA**
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B. Lists

A Trello board is made up of lists, which often represent steps.

Think about the way you are delivering work and create a new list for every step of that process. Take the simplest *To Do, Doing, Done* workflow as an example: *To Do* is a *list* that holds multiple tasks, which can be represented by Cards.

C. Cards

Each **card** in Trello corresponds to a task in your workflow. Add cards to lists to keep track of that workflow. In Trello, you can drag and drop cards across the board to show progress or organize them into different orders to prioritize some work. In the simplest *To Do, Doing, Done* workflow, cards start in the *To Do* list and travel all the way to the *Done* list.
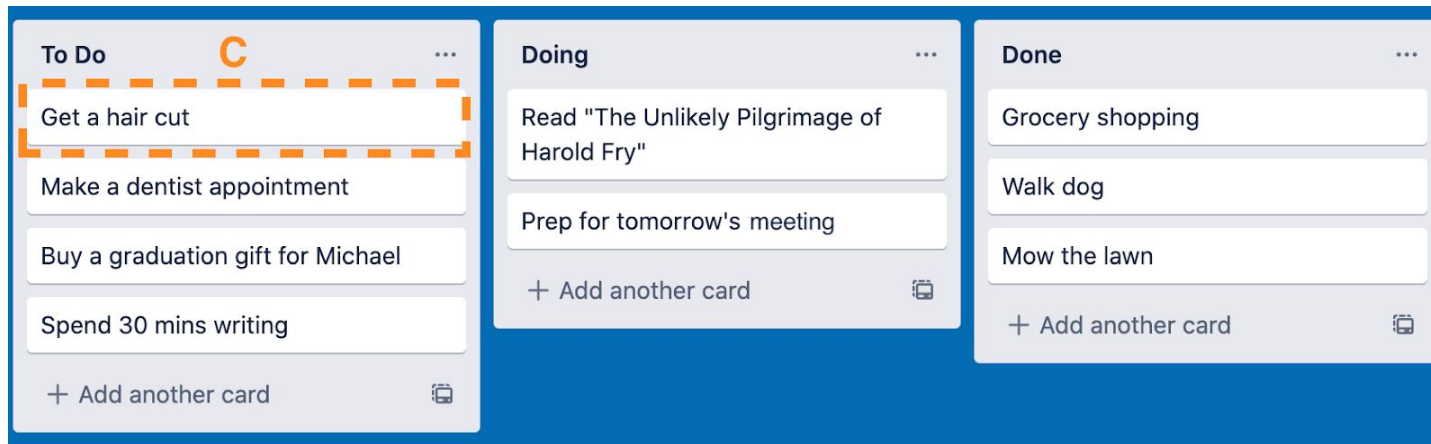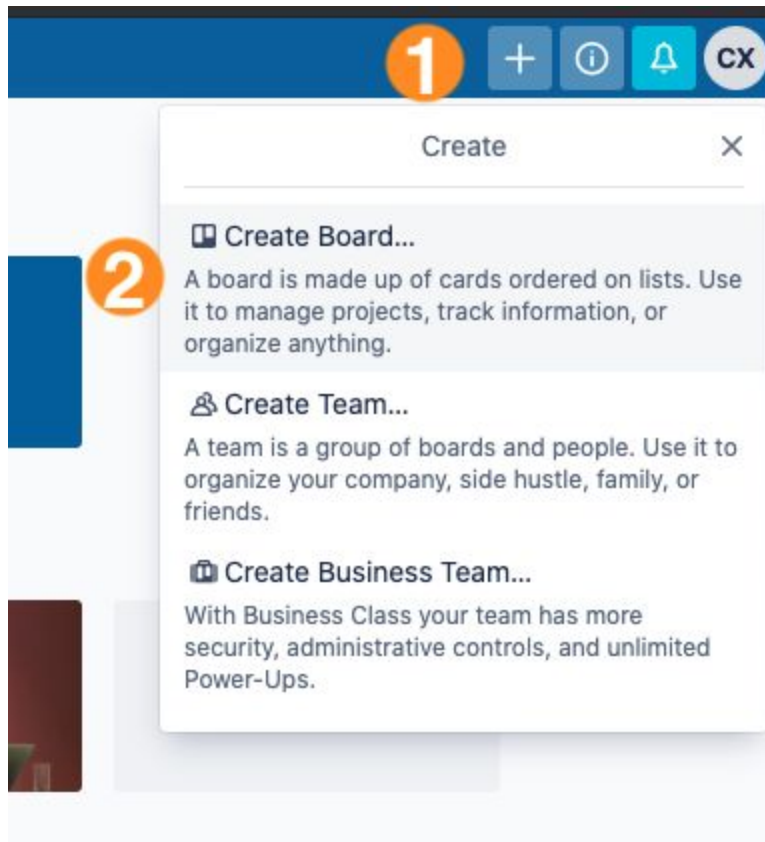

D. Menu

Menu is the mission control center for your board. The menu is where you manage members, control settings, filter cards, and much more.
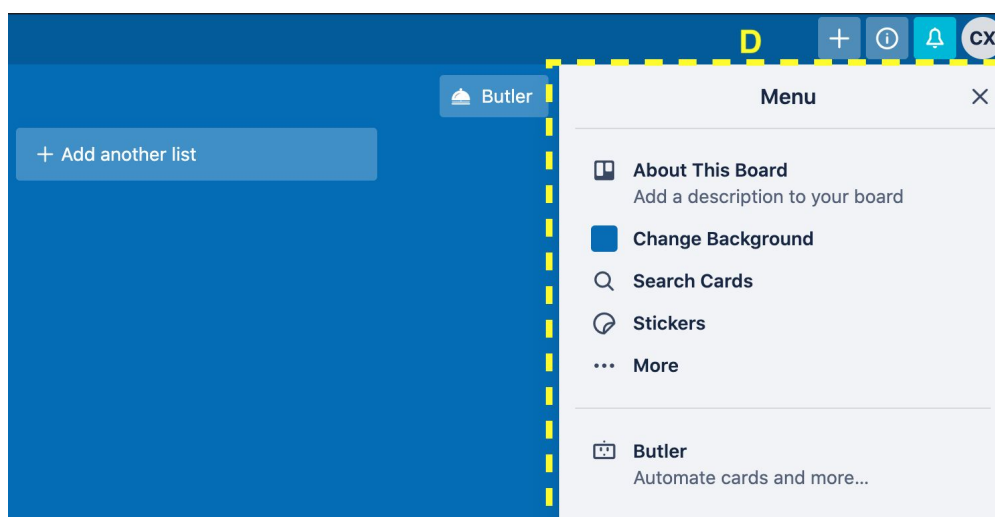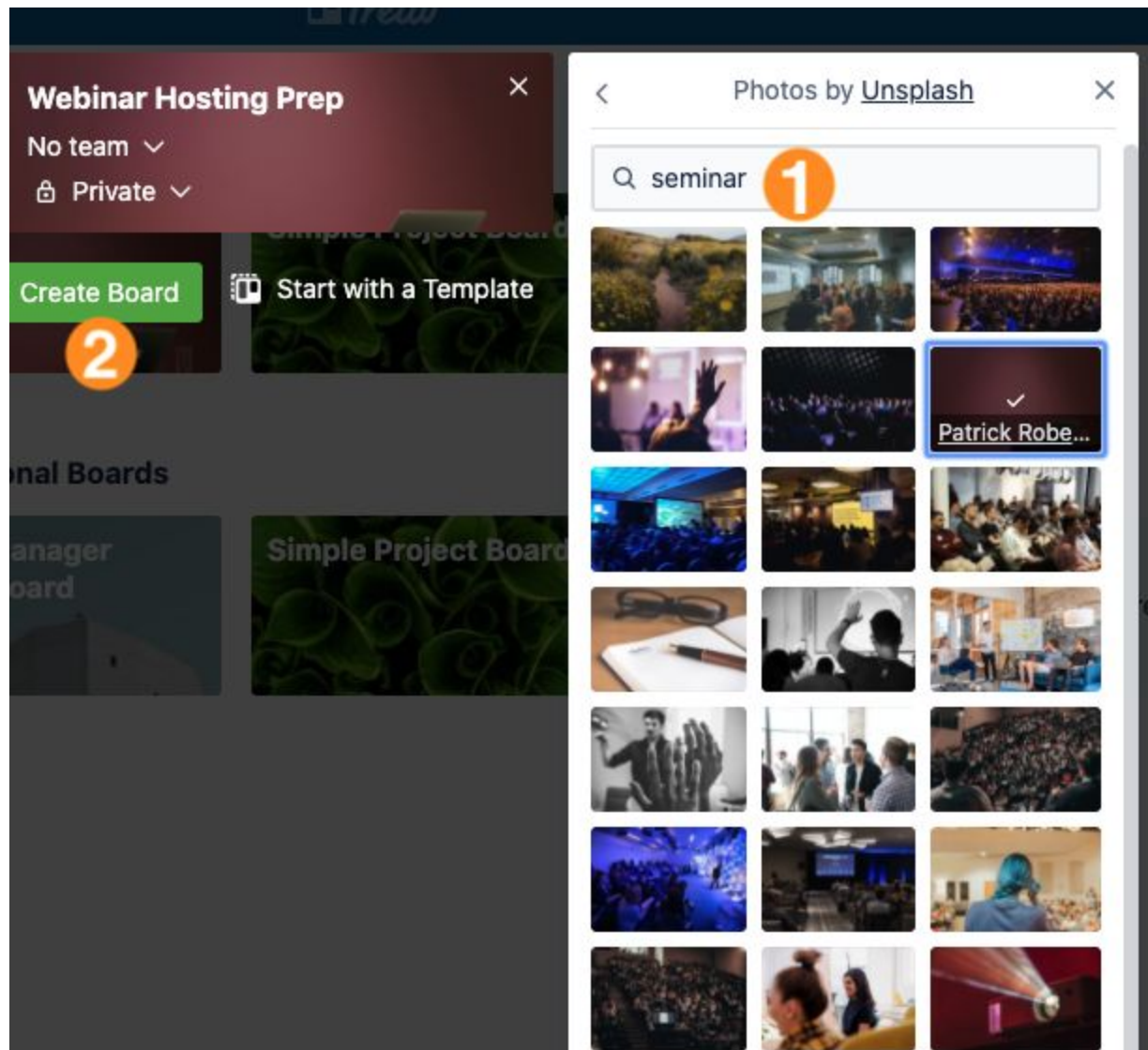
Create A Trello Board

To create a new Trello board, click the plus sign at the top right corner of Trello and select *Create Board*.

Let's add a board title. Suppose you are about to host a webinar next month, and you'd like to do some preparation before it. We are also going to change the board background. Click on the ellipses sign, then **see more** beside *Photos*.
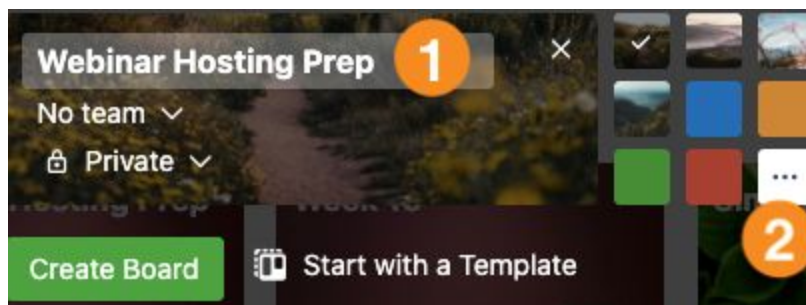
Search by keywords and pick the one you like! I chose something related to our online seminar theme. Once done, click **Create Board**.

Add Lists

Recall that a Trello board is made up of lists, which often represents steps.

In Trello, you can create as many lists as you want and order them however you like. Let's create three lists: **To Do, Doing,** and **Done** to represent the status of tasks that need to get done for hosting a webinar.
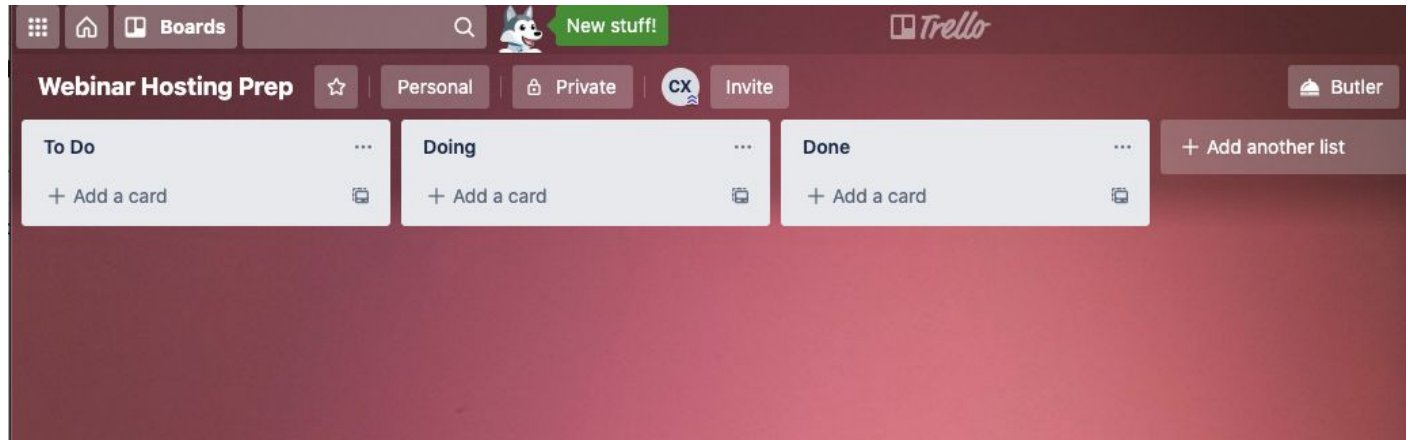
Add Cards

Now add cards to the **To Do** list. For the demo purpose, I am adding some simple tasks: **Decide on the webinar format, find a great presenter,** and **pick a Webinar platform**.
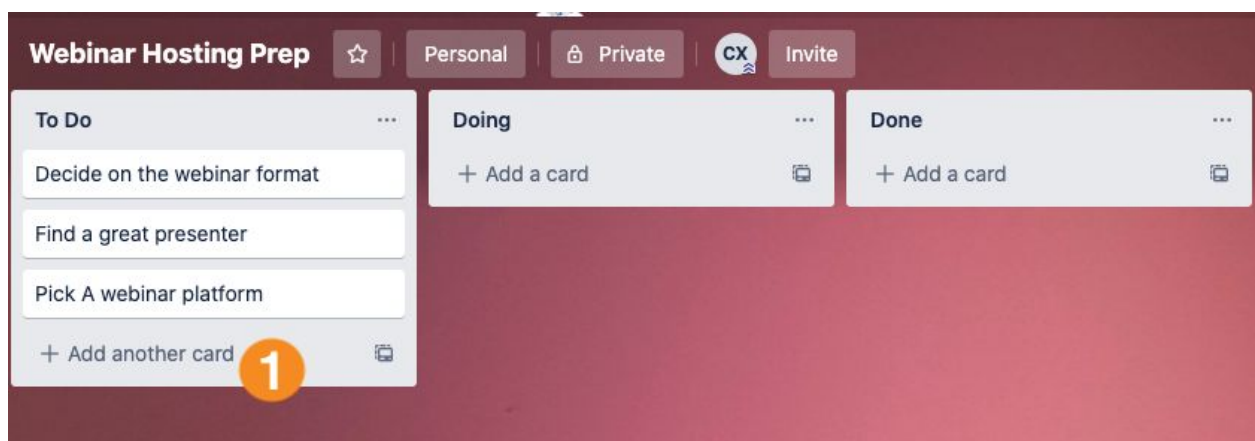
Add Card Details

We need to decide on the webinar format first before we start to look into finding a great presenter. Let's add more information to it:

- Create a **Checklist** of webinar formats we need to check out
- Set a **Due Date** for it

Click on the *Decide on the webinar format* card.

Select **Checklist** from the right-hand side menu.

Now let's add some popular formats: *Single Speaker Chat Style, Interview Style, Panel Discussion, Q&A - Ask Me Anything*.

Let's also set a deadline for this task. Also on the same menu, select **Due Date** and set the due date to be May 15th (or any other date). You may also specify a time.

Change Due Date   ✕

Date	Time
5/15/2020	4:00 PM

Prev   May 2020   Next

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Set Reminder

1 Day Before ⬍

Reminders will be sent to all members and watchers of this card.

Save   Remove

🚀 Enable the Calendar Power-Up!

You'll get a calendar view of your cards and an iCal feed. Woo!

Once done, click **Save**. Now the task has a due date as well a checklist.

To Do   ⋯

Decide on the webinar format

🕐 May 15   ☑ 0/4

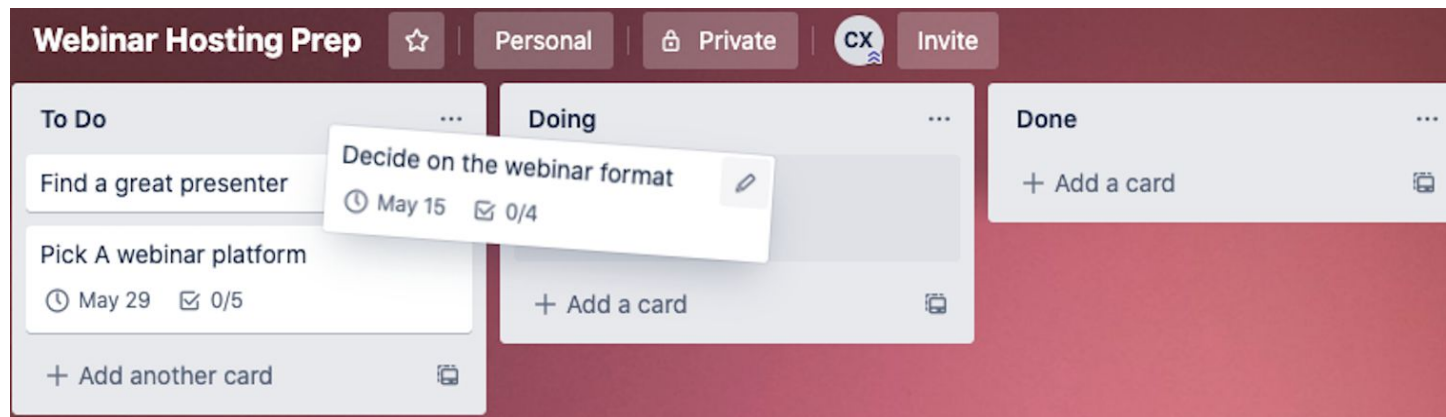**UNIVERSITY OF ALBERTA**
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You can also add more information to this card, including

- Attachments
- Comments
- Labels
- Description

Making Progress

Now it's time to get some work done and make some progress. Since we are going to decide on the webinar's format first, let's drag and drop that card into the **_Doing_** list.

As we are researching and learning more about webinar formats, don't forget to check the box after one format has been researched.

Now it looks like you've studied all the common formats before the due date. Let's check the box in front of our May 15th due date.

This task is done! Let's now move it to the **Done** list.
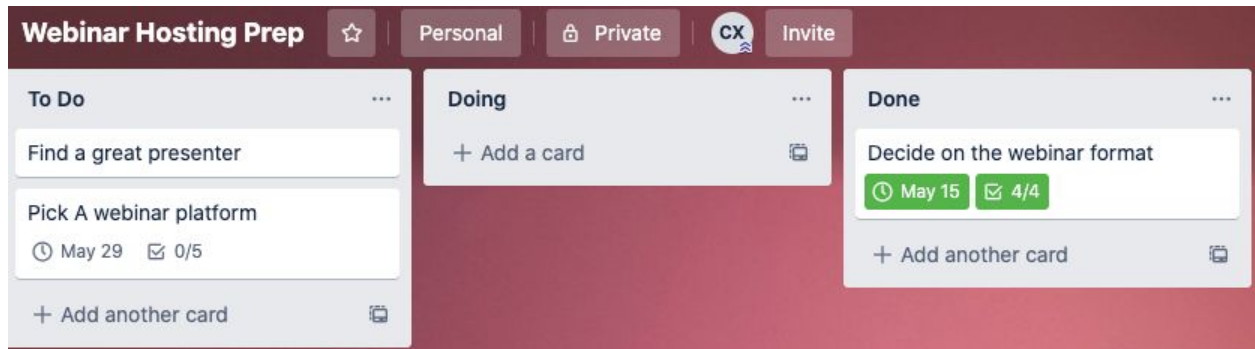
Exercise

Now it's your turn to try Trello out! If you are following along, here are some simple tasks for you to work on:

For the card ***Pick a webinar platform:***

- Make a checklist
- Set a due date
- Add a cover (Hint: it's in the same menu with **Checklist** and **Due Date**)
- Write a comment
- Move it around

Don't know what platforms are out there (and don't feel like searching it up)? Here are some names we got for you: Zoom, WebEx, Google Hangouts Meet, Livestorm and Adobe Connect.
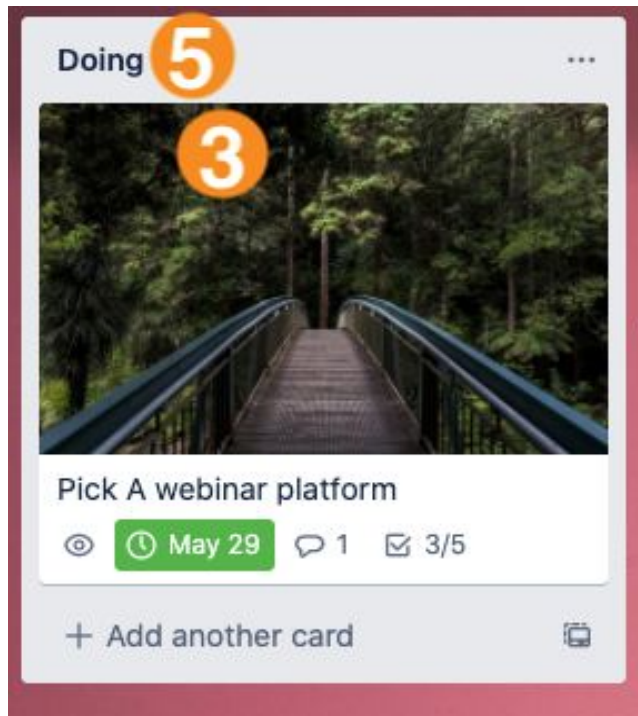
Proposed Solution & Discussion

(Please note that this is only one approach, and not the *only* solution)

Feel free to create your own board of a project or goal to work on. Trello also provides you with lots of professional, ready-made templates to accelerate things. Please share your board (of any topic) with your peers in the discussion forum. Inspire us with more creative and organized ideas.

In later courses, you will see tutorials focused more on the software tasks - stay tuned.